THE NOTES SYSTEM

CONTENTS

OVERVIEW

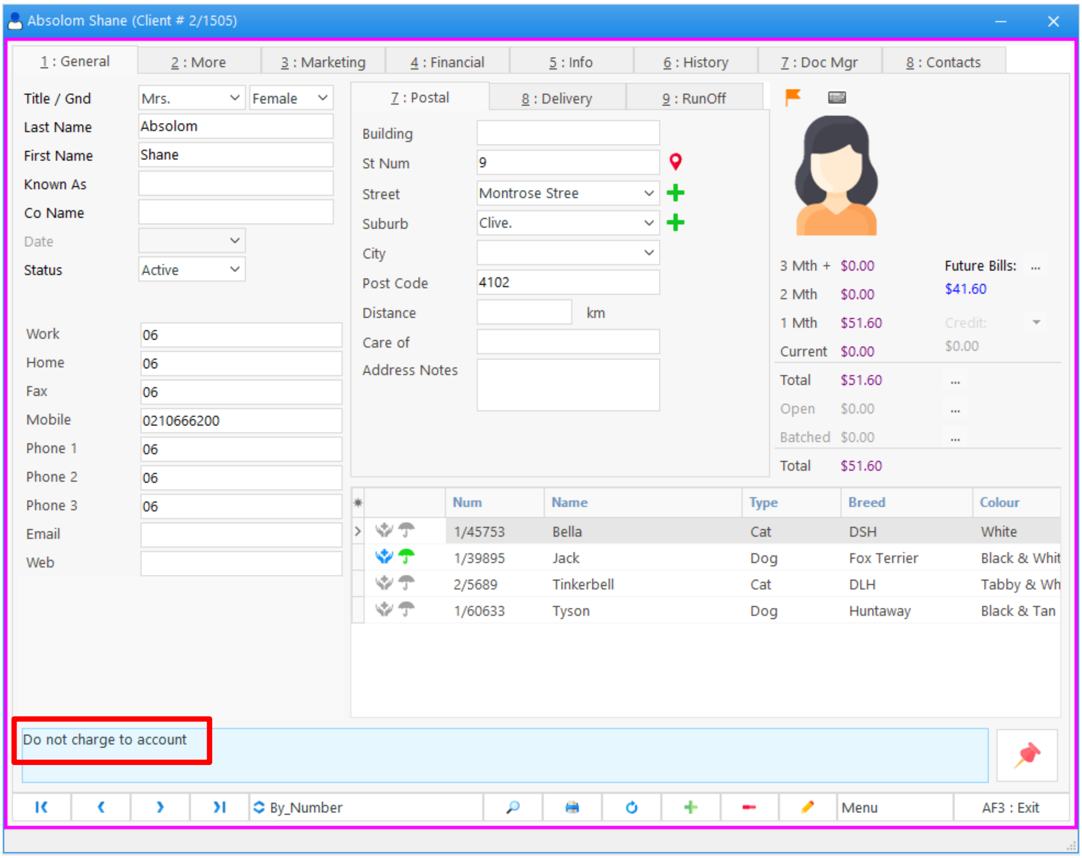
The notes system is used to display pop-up or printed notes at various user defined stages in VetlinkPRO. For example, you can automate the system to display a note when a certain product is added to a bill or when a bill is made for a particular client. These notes may be prompts to advise of product specials or important information a staff member needs to know about a client while billing or making an appointment. Notes can be added for patients, clients, products, staff members and suppliers. The process for adding these reminders however is the same throughout the program.

PRECONFIGURED NOTES

Preconfigured notes are notes with pre-set behaviour and are available from the Patient, Client, Product, Supplier or Staff record forms.

Simple Note

Simple Notes display in the yellow information screen at the bottom of the client, product, staff member or supplier records. These notes will only display when you open the record for a client, product, staff member or supplier.



Print on History

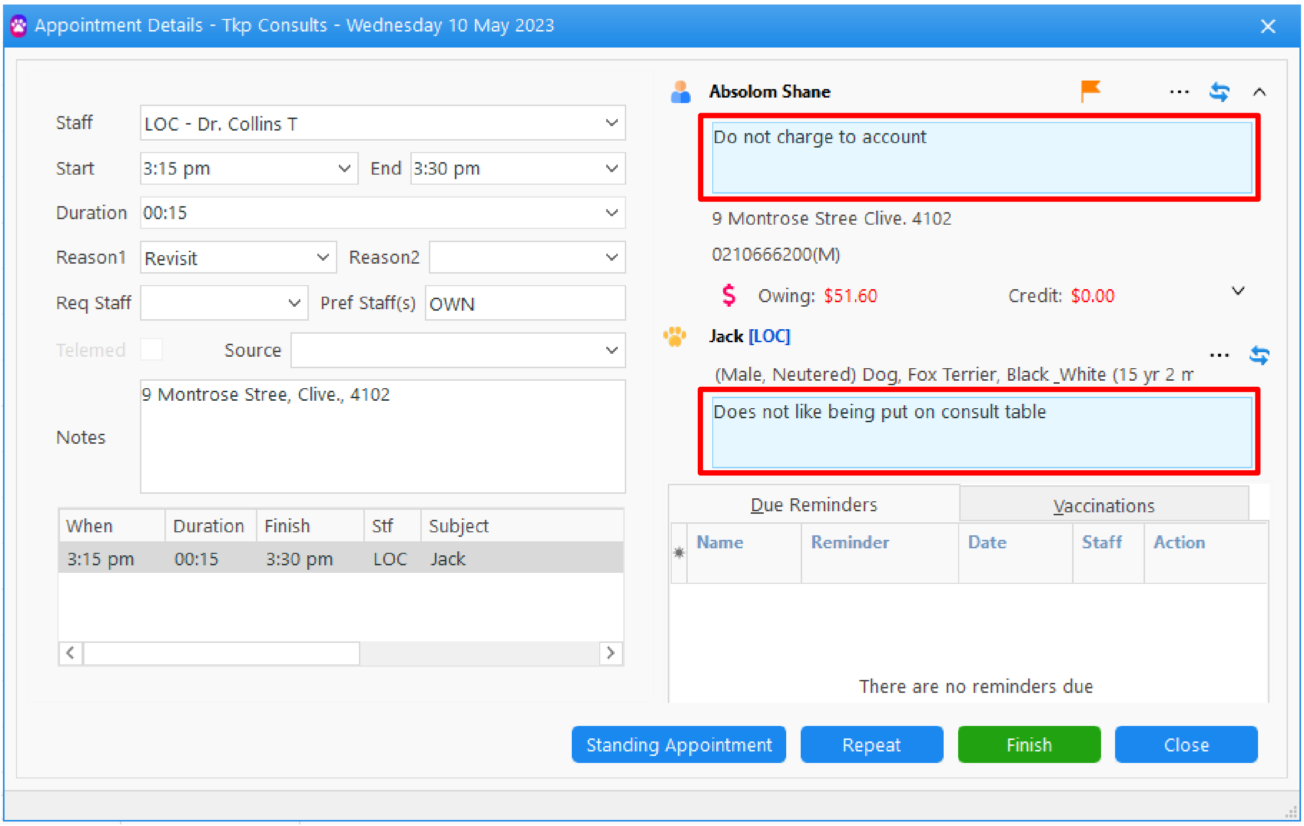
A **'Print on History'** note will print out at the bottom of a patient's printed history. This is useful if you print out the previous histories for patients before they come in for their appointment. You can have a warning at the bottom of the history stating any allergies to products they might have.

Print on Bill

A **'Print on Bill'** note will print out at the bottom of the tax receipt. An example of a 'Print on Bill' note is for when a product has instruction for its use which you need to automatically print out. It is best to use Product Handouts if this is going to be more than a sentence or two.

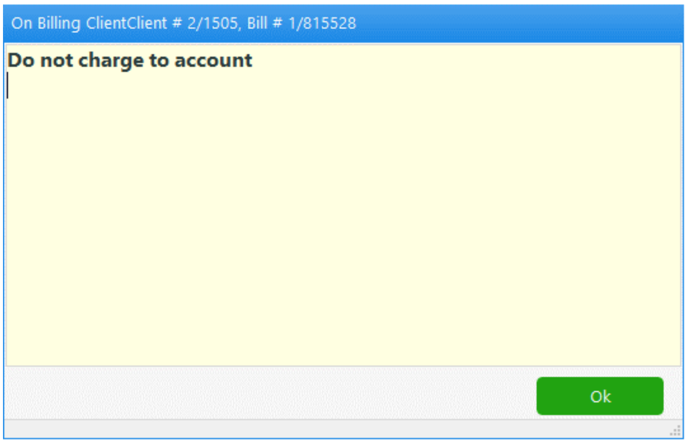
Show on Diary

A **'Show on Diary'** note displays in the blue panel underneath the client or patient name in the appointment confirmation form.



Popup at Billing

A **'Popup at Billing'** note is a pop-up note that will pop-up when either a client, patient or product is added to a bill, depending on where the note is set.



Show on Order

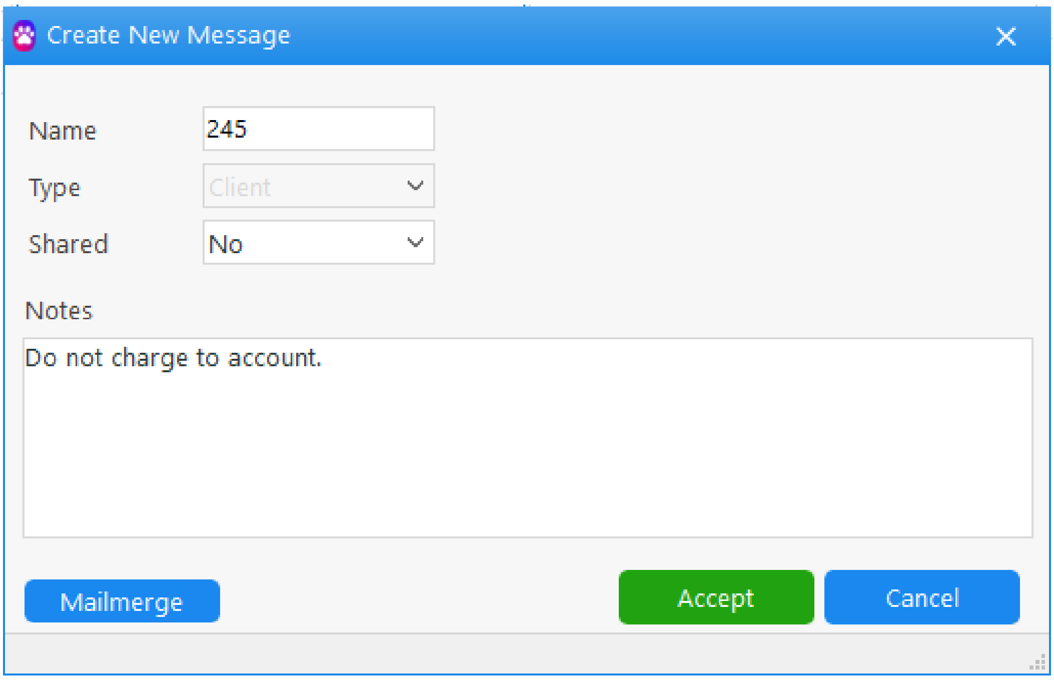
A **'Show on Order'** note is a pop-up note that will pop-up when either a product or supplier is added to an order, depending on where the note is set.

Popup at Inwards Goods

A **'Popup at Inwards Goods'** note is a pop-up note that will pop-up when either a product or supplier is added to an invoice, depending on where the note is set.

How to Set up Preconfigured Notes

1. Open the patient, client, product, staff member or supplier record that you wish to add a note to.
2. Next click on the  button in the bottom right-hand corner of the screen.
3. From the pop-up menu click on the type of preconfigured note you wish to add.
4. This will bring up the **'Create New Message'** screen.
5. Enter the note and click the **'Accept'** button.

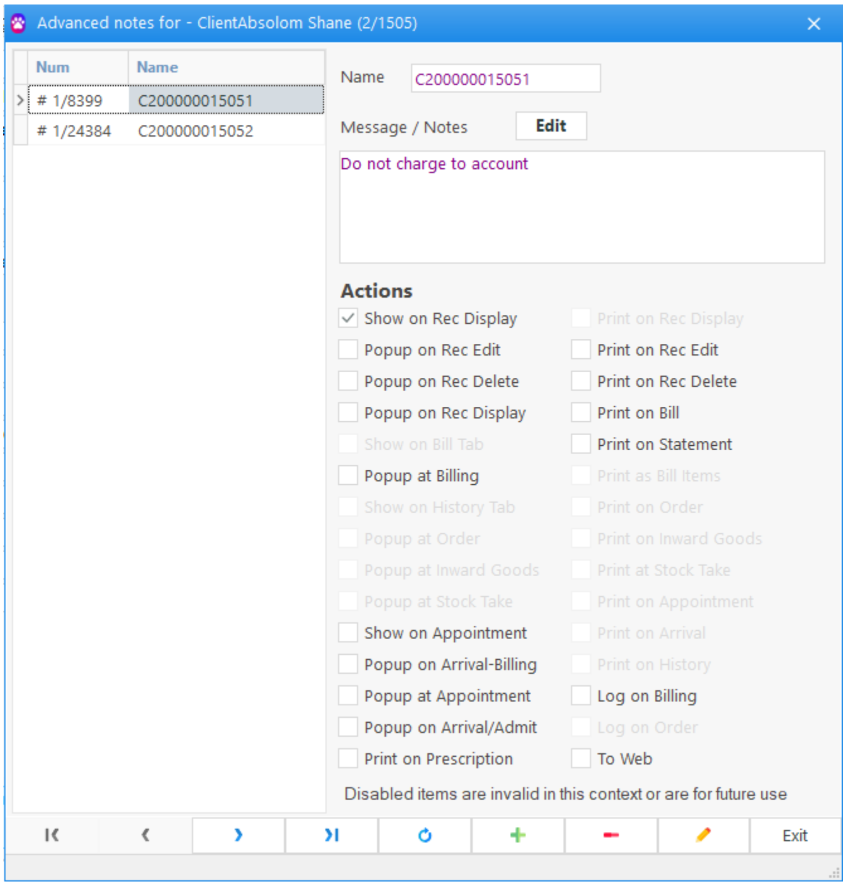


USER DEFINED NOTES (ADVANCED NOTES)

Advanced notes allow you to create a note and select where you would like this to appear in VetlinkPRO. For example, a certain product may have instructions for use which need to be given to the customer. Using advanced notes you can automatically print the instructions out at the bottom of the receipt every time that product is used on a bill.

Setting Up a New Advanced Note

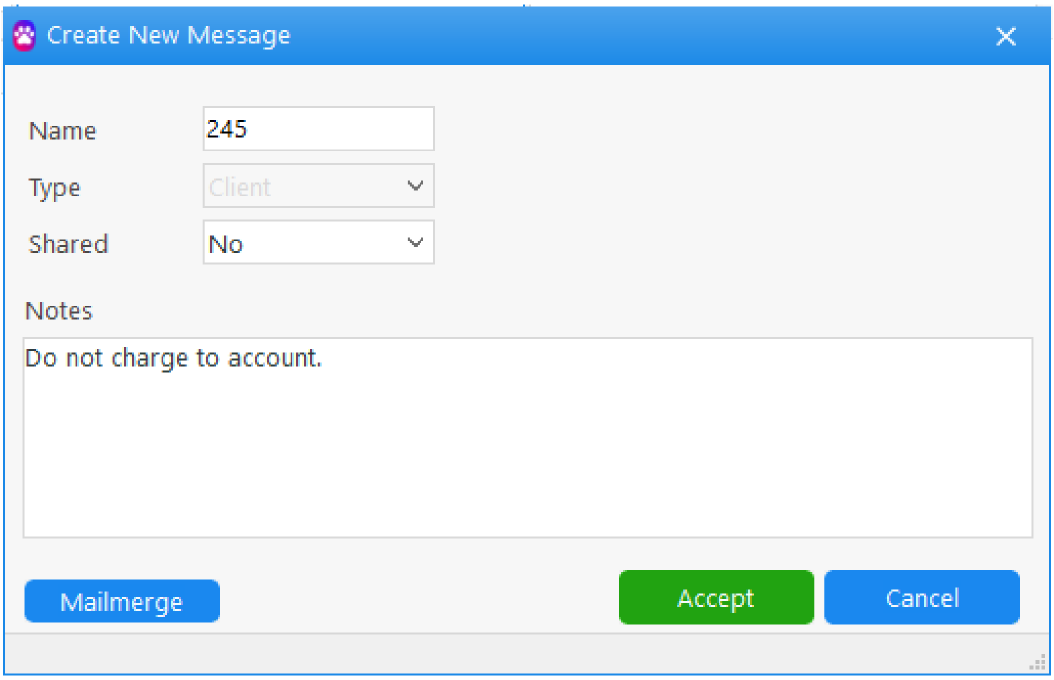
1. Search for and open the client, patient, product, staff or supplier record you wish to add an advanced note to.
2. Click on the  button in the bottom right-hand corner of the record and choose **'Advanced Notes'**.
3. The advanced notes form will open, click on the **'+'** button.



4. The advanced note search form will open, click on the **'New'** button.
5. The **'Create New Message'** form will now open.
6. Enter a name for the note and type up the note you wish to add.

7. If you wish this note to be available for use on other patient, client, staff, product or supplier records set **‘Shared’** to **‘Yes’**.

TIP: You can add mailmerge variables to the note by clicking on the **‘Mailmerge’** button. This is useful for generic notes where you wish to show client, patient or product specific details. For example, a print on bill note can have mail merge variables of the first and last name of the client. When the receipt prints the client’s name that was used for the bill will be merged into the note in place of the mail merge variables.

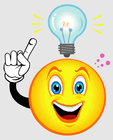


8. Once the note has been finished click on **‘Accept’**.

9. You will be taken back to the advanced notes form.

10. Single left click on the note you have just added the text will display in the top right panel of the screen. The bottom right-hand panel is a list of check boxes that govern where the note will show in VetlinkPRO.

11. Check the boxes where you want the note to display and then click on the tick button to save.



NOTE: Depending on what screen the actions are viewed from some of the actions may not be available. Actions in purple or that are greyed out are not available.

Actions	
Show on Rec Display:	Displays the note in the yellow panel at the bottom of the record.
Popup on Rec Edit:	Displays a note when the record is being edited.
Popup on Rec Delete:	Displays a note when the record is being deleted.
Popup on Rec Display:	This note will popup when the client record is opened.
Show on Bill Tab:	Displays the note at the top of the billing window.
Popup at Billing:	This will pop-up the note when a bill is created with a particular record on it.
Show on History Tab:	Displays the note at the top of the history section at billing.
Popup at Order:	This will pop up a message on the order screen when loading a record onto an order.
Popup at Inwards Goods:	This will pop up the message when loading a record onto an invoice.
Popup at Stocktake:	This will pop up a message on the stocktake screen.
Show on Appointment:	This will display a note in the appointment details screen.
Popup at Arrival-Billing:	This will pop-up a message when the client arrives.
Popup at Appointment:	This will pop-up a message when an appointment is made.
Popup on Arrival/Admit:	This will pop-up a message when the patient is marked as admitted.
Print on Prescription:	Prints the note on prescriptions.
Print on Rec Display:	Not yet implemented.
Print on Rec Edit:	Prints the note on the record when edited.
Print on Rec Delete:	Prints on the record when deleted.
Print on Bill:	Prints out the note on a bill.
Print on Statement:	Prints out the note on a statement.
Print as Bill Items:	Prints on bill and statement as bill items.
Print on Order:	Not yet implemented.
Print on inwards goods:	Not yet implemented.
Print at Stock Take:	This will print out a note with the stocktake.
Print on Appointment:	Not yet implemented.

Print on Arrival:	Not yet implemented.
Print on History:	The note will print on the client visit history notes.
Log on Billing:	This will Log the message on billing.
Log on Order:	The note will be logged on the order.
To Web:	Not yet implemented.

Adding an Existing Advanced Note

1. Search for and open the client, patient, product, staff or supplier record you wish to add an advanced note to.
2. Click on the  button in the bottom right-hand corner of the record and choose advanced notes.
3. The advanced notes form will open.
4. Click on the **'+'** button.
5. Type in the first few letters of the note you wish to add and click on search.
6. Select the note you wish to add and click on **'Accept'**.
7. You will be taken back to the advanced notes form.
8. Single left click on the note you have just added the text will display in the top right panel of the screen. The bottom right-hand panel is a list of check boxes that govern where the note will show in VetlinkPRO.
9. Check the boxes where you want the note to display and then click on the tick button to save.

BILL NOTES

VetlinkPRO allows multiple types of messages to be added to client bills.

Bill Item Notes

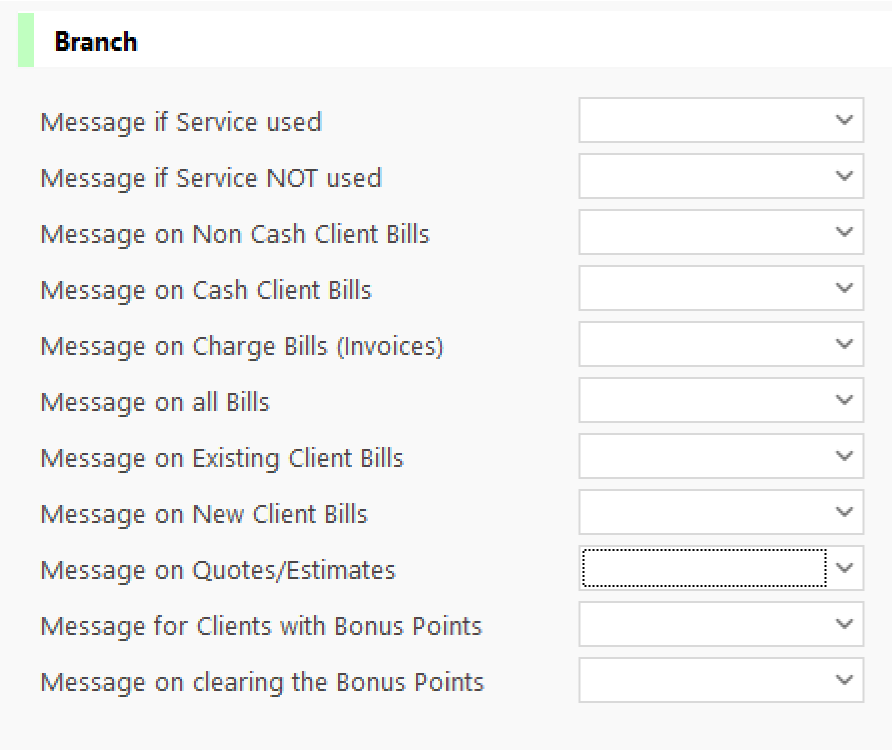
1. Open the bill that you intend to place a bill item note on.
2. Add a new bill line and select the type **'M'** for Message.
3. You will get a popup where you can enter your message.
4. Click **'Accept'** to save your message. This message will only apply to the bill it is added to and will be placed in line with other Items added to the bill.

Creating Bill Notes

1. Go to **Options | Picklists | Bill | Bill Notes.**
2. Click the green **'+'** to create a new bill note.
3. Give the note a name so you can locate it later.
4. Set Shared to **'Yes'**.
5. Type your message in the **'Notes'** section. You can add mailmerge fields to make the note specific to the client if required.
6. Select **'Accept'** to save the message.

Adding Bill Notes

1. Go to Options | Setup | Billing | Messages.
2. Find the category of bill you want the bill note to be applied to from the choices available.
3. Select a message from the drop-down list.
4. Close VetlinkPRO setup and select save on the popup to save the changes you have made.


Branch
Message if Service used
Message if Service NOT used
Message on Non Cash Client Bills
Message on Cash Client Bills
Message on Charge Bills (Invoices)
Message on all Bills
Message on Existing Client Bills
Message on New Client Bills
Message on Quotes/Estimates
Message for Clients with Bonus Points
Message on clearing the Bonus Points

STATEMENT NOTES

VetlinkPRO allows notes to be added to statements. You can add these notes to all statements, blank batch codes, non-blank batch codes or a combination of the above.

Creating Statement Notes

1. Go to **Options | Picklists | Bill | Statement Notes.**
2. Click the green **'+'** to create a new bill note.
3. Give the note a name so you can locate it later.
4. Set Shared to **'Yes'**.
5. Type your message in the **'Notes'** section. You can add mailmerge fields to make the note specific to the client if required.
6. Select **'Accept'** to save the message.

Adding Statement Notes

1. Go to **Financial | End of Period | Db EOM | Print Statements.**
2. Before you make statements, select the messages to use. If you make the statements before setting the messages, you will need to re-make statements before printing or emailing.
3. Continue performing Debtors End Of Month as outlined in chapter 13.